Add an Endpoint/Role for a User in OTCnet

To add an **endpoint/role** for OTCnet User, complete the following steps:

- 1. From the OTCnet Home page>Administration>Manage Users>Manage OTCnet Users screen, select the Search User Directory button.
- 2. In the search field, type user **email address** as shown in Figure 1.
- 3. Under Manage User Account, select View Account.

Figure 1: Search User Directory Screen



- 4. The Manage User Account screen displays as shown in Figure 2.
- 5. Review the read-only information. Select the **Add Endpoint/Role** button.

Add Endpoint/Role

Figure 2: Manage User Account Screen

- 6. The Add Endpoint/Role screen displays as show in Figure 3.
- 7. Select a **role** from the **Choose a Role** dropdown choosing from the options provisioned for the specific OTCnet user. Then select the associated **level(s)** from the dropdown options

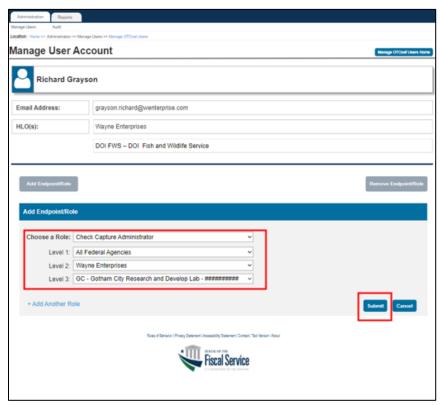
(each one is based on the previous selection and may be prepopulated). There can be many levels to select depending on the HLO/endpoint hierarchy.



Application Tip

- As needed, add another **role** by selecting the **Add Another Role** link, and then select a different role and associated level(s) from the dropdown options.
- You are allowed to select up to 3 roles at a time. To add any additional roles, you
 must repeat the process by submitting a new request.
- 8. Select the **Submit** button to submit your request.





- 9. The confirmation page after submitting an endpoint/role request and it is awaiting approval appears as shown in Figure 4.
- 10. Select the **OK** button to return to the **Manage OTCnet Users** screen.

Manage User Account Confirmation Your request has been submitted, and it is awaiting approval. You will be notified via email when it is rejected or approved. Request Type: Access Approval Request ID #: 307 Request Description: OTC Endpoints and roles were added to the user's account. Assigned Role at Endpoint CN - CaliforniaNevada Check Capture Administrator CN - CaliforniaNevada Card Operator FWS NE Regl Ofc Check Capture Operator FWS Valley Stream Check Capture Operator Sept 20, 2022 2:30 PM EDT Time Submitted: Fiscal Service

Figure 4: Confirmation Screen on Adding Endpoint/Role Request Submitted



You will be notified via e-mail when the request is approved or rejected.